

How to assign a Customer and Ship-To ID in VendorDesk

This documentation will provide the steps necessary to assign Customer and/or Ship-To IDs to customer accounts in VendorDesk.

When you receive an order for a new customer (or address) who does not yet exist in your VendorDesk "Customer/Ship-To IDs", they will populate in the "Pending" tab under "Orders". Orders that are in "Pending" will not be processed in VendorDesk or be sent to a file/FTP server (if applicable).

In order to process these orders, you must assign a Customer and/or Ship-To ID.

1. Once an order for a new customer/address has been submitted by the sales agency, the first step is to navigate to Orders -> Pending. Here you will find sales orders that are waiting for an ID to be assigned so they can be processed.

Support Vendor sys admin		Pending Orders Download Pdf Reintegrate									
Dashboard											
Orders											
Orders											
39 Pending											
Customers/Ship-To											
Products											
Billing											
Users											
Settings											
		PO	Customer	Address	City	State	Zip	Amount	Order	Ship	Received
		153	Cust ID Test Account 3	4 Jersey St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		154	Customer Test Account 4	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		155	Customer Test Account 5	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		156	Customer Test Account 6	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		157	Customer Test Account 7	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		158	Customer Test Account 8	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		159	Customer Test Account 9	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
		160	Customer Test Account 10	123 Main St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46

2. Once you have identified a sales order belonging to a new customer/address, you must open the sales order and set a Customer ID. Here is where you can specify a Customer ID and a Ship-To ID.

Order

Set Customer Id

Message To Rep

Download Pdf

Aleran Support

BILL TO

attn: Aleran Support
Cust ID Test Account 3
4 Jersey St
Boston, MA 02215
support@aleran.com

SHIP TO

attn: Aleran Support
Cust ID Test Account 3
4 Jersey St
Boston, MA 02215
support@aleran.com

PO#: 153

Sales Rep: sys admin

Location: Road

Status:

NOTES:

add new note

REP ID	CUSTOMER ID	CUSTOMER PO	SALE DATE	SHIP DATE	CANCEL DATE	SHIPMENT METHOD	PAYMENT TERMS
		153	01/24/2025	ASAP			
ITEM	DESCRIPTION	QTY	PRICE	DISCOUNT	NET PRICE	TOTAL	
1	BBPB-445 Bright Birthday Party Banner w/ Cotton String 840266635840	6	\$5.00		\$5.00	\$30.00	
Total:						\$30.00	

Customer and ShipTo Id

×

Customer Id

ShipTo Id

SAVE

CANCEL

- Once you have assigned an ID to the customer/address, please select save. After you save, you will notice that the sales order has moved from "Pending" to "Orders".

Customer and ShipTo Id ×

Customer Id
024

ShipTo Id
A01

SAVE

CANCEL

Support Vendor sys admin										
Orders Download Pdf Reintegrate Mark As Processed Export Excel										
PO# Customer City/Address Rep Name ---Any Agency--- <input type="checkbox"/> Include Processed Orders										
<input type="checkbox"/>	PO	Customer	Address	City	State	Zip	Amount	Order	Ship	Received
<input type="checkbox"/>	153	Cust ID Test Account 3	4 Jersey St	Boston	MA	02215	\$30.00	01/24/25	ASAP	01/24/25 20:35:46
<input type="checkbox"/>	154	Cust ID Test Account 1	100 Main St	Boston	MA	02101	\$10.00	01/24/25	ASAP	01/24/25 20:35:46
<input type="checkbox"/>	155	Cust ID Test Account 1	100 Main St	Boston	MA	02101	\$10.00	01/24/25	ASAP	01/24/25 20:35:46
<input type="checkbox"/>	156	Cust ID Test Account 1	100 Main St	Boston	MA	02101	\$10.00	01/24/25	ASAP	01/24/25 20:35:46
<input type="checkbox"/>	157	Cust ID Test Account 1	100 Main St	Boston	MA	02101	\$10.00	01/24/25	ASAP	01/24/25 20:35:46

4. You will be able to view and manage all Customer and Ship-To IDs in VendorDesk under the “Customers/Ship-To” tab. All future sales orders for these customers and ship-to addresses will display the ID numbers.

Support Vendor
sys admin

Dashboard

Orders

Customers/Ship-To

Products

Billing

Users

Settings

Customers/Ship-To | File

Customer Code

Ship Code

Search

☐ Rep-Matched

Last Refreshed: 10/28,

Customer	ShipTo	Name	Addr1	Addr2	City	State	Zip
022	A01	Cust ID Test Account 1	123 Rifle Range Rd		Charleston	SC	29464
022	A02	Cust ID Test Account 1	54 Charles St		Manchester	NH	30133
022	A03	Cust ID Test Account 1	34 Yawkey Way		Boston	MA	02164
023	A01	Cust ID Test Account 2					
024	A01	Cust ID Test Account 3	4 Jersey St		Boston	MA	02215